



Viticulture, enology and marketing for cold-hardy grapes



Upper Midwest Winery Tasting Room Visitor Study

The State of Wisconsin (17 Partner Wineries)
The State of Minnesota (8 Partner Wineries)

Don Holecek and Dan McCole

Department of Community Sustainability, Michigan State University

Background and Rationale: Understanding consumers' interests, preferences, and product awareness is critical to developing successful marketing strategies for any product or service, especially new products like cold climate wines. Work began in Michigan in 2011 to develop this understanding for consumers of these relatively new wines and was extended to Minnesota and Wisconsin in project year 4. Since most wine produced in these two states is sold directly to visitors in winery tasting rooms, samples of these visitors were the focus of this study. At the request of winery owners in Wisconsin, the core survey instruments used were extended to collect data to assess the economic impacts associated with winery tourism in Wisconsin. Given the rapid increase in use of social media by wine consumers as well in winery marketing activities, it was decided to collect data to assess how these technologies are being used to reveal how they might be better employed to increase tasting room sales. This study component will support the thesis of a MS student. Two other Ph.D. level graduate students research team members were also able to collect data through this project to be used in meeting their degree requirements.

Treatments: The tasting room survey instrument successfully used in Michigan was updated and slightly improved, based upon lessons learned in the Michigan tasting room survey. To the extent possible, survey instrument items were kept the same for both Minnesota and Wisconsin leading to comparable results across these two states as well as to those obtained previously in Michigan.

Methods: An essential first step was to recruit a representative group of winery tasting room partners in Minnesota and Wisconsin. A total of 17 partners were recruited in Wisconsin, and 8 partners were recruited in Minnesota. Following lessons learned in the earlier Michigan pilot study, winery partners collected contact information from a quasi-random sample of their visitors and submitted it to our survey team. The survey instruments were emailed to contacts supplied by winery partners. Only email was employed because, it was determined in the Michigan pilot study to be preferred by respondents and yielded a slightly better rate of response.

Results: The bulk of the time in project year 4 was devoted to gearing up for and completing data collection. It proved to be a successful year based upon the volume of completed surveys that were collected. For example, roughly 1,345 surveys were completed in Wisconsin and 667 in Minnesota. About 1,720 surveys with core questions were completed in both states. Over 540 completed surveys with social media questions were obtained. These large data sets will permit in depth analysis in project year 5.

Some initial findings from early analysis of some priority questions in the survey are presented in the four tables on the following page.

Table 1. Reported Level of Awareness of Cold Climate Wines

	<i>Tasting Room Visitor (WI)</i>	<i>Tasting Room Visitor (MN)</i>
Not Familiar	45.9%	39.2%
Somewhat Familiar	41.7%	41.3%
Familiar	10.2%	15.4%
Very Familiar	2.2%	4.1%

Table 2. Have You Ever Tasted Cold Climate Wines?

	<i>Tasting Room Visitor (WI)</i>	<i>Tasting Room Visitor (MN)</i>
Yes	71.3%	79.2%
No	28.7%	20.8%

Table 3. Respondents Perceptions of Cold Climate Wines that They have Tasted

	<i>Tasting Room Visitor (WI)</i>	<i>Tasting Room Visitor (MN)</i>
Liked a lot	41.3%	47.6%
Liked a little	30.1%	35.3%
It was okay	17.1%	12.3%
Disliked	11.5%	4.8%

Table 4. Percent of Respondents that have heard of Each Listed Cold Climate Wine Variety

<i>Variety Name</i>	<i>Tasting Room Visitor (WI)</i>	<i>Tasting Room Visitor (MN)</i>
Snow Bird*	8.3%	5.5%
Brianna	14.2%	24.1%
Edelweiss	35.0%	46.8%
Frontenac	58.9%	79.3%
Alpino Rouge*	1.5%	2.1%
Crystal Lago*	1.5%	2.1%
La Cresent	46.7%	72.6%
Marquette	56.0%	71.3%
St. Pepin	43.7%	43.0%
La Crosse	38.1%	46.4%
Haven't heard of any	21.1%	8.4%

*Made up variety name to assess quality of responses

Overall, the results obtained in Minnesota and Wisconsin are similar and are additionally similar to those obtained in the Michigan tasting room survey. Minnesota respondents are slightly more aware of cold hardy wines and individual grape varieties than are Wisconsin respondents. Respondents in both states were found to be much more aware of specific grape varieties than were Michigan respondents.

What the results mean:

- Brand awareness of cold climate wines is highest in Minnesota (~60%) and lowest in Michigan (~45%) with Wisconsin in the middle at ~54%. The relatively low brand awareness in Minnesota and Wisconsin are especially problematic since respondents from these states were probably tasting cold climate wines during their winery visit.
- However, respondents in both states are likely to have heard of one or more popular cold climate grape varieties (Wisconsin 79%, Minnesota 92%). This suggests that emphasizing grape varieties holds promise in marketing cold climate wines in states where they dominate total wine production.